



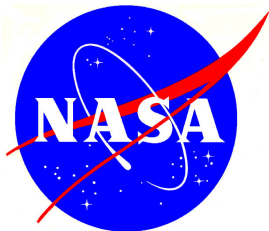
Integrated Financial Management Program

Core Financial

Course Name: Operating and Phasing Plans

Module 2: Phasing Plans

Course Guide



Introduction

This course guide serves as the foundation for delivering training.

Course Structure

This course covers the basic SAP functionality that is needed to perform specific activities. Information beyond the scope of this class may be obtained from the On-Line Quick Reference (OLQR) tool or from designated Super-users.

Trainer Role

A trainer role in this training session is to:

- Provide end-users with the information they will need to learn the new skill set
- Provide end-users with guidance and coaching as they learn the new skills
- Maximize the hands-on practice time
- Ensure the objectives of the module are met
- Answer questions as completely as possible

End-user Role

An end-user's role in this training session is to:

- Participate in order to understand new roles, SAP concepts, processes, and principles presented
- Ask questions, when clarification is needed
- Complete all activities/exercises

Module Significance

SAP provides an automated means to prepare, record, and maintain Phasing Plan versions within the Funds Management (FM) and Project Systems (PS) modules on a monthly basis.

Module Structure

This module is structured so that the amount of hands-on practice utilizing SAP is maximized. Each of the topics is organized around the following structure:

Content

Lecture material is provided by the trainer on new roles, SAP concepts, processes, and principles.

Content Review

The trainer reviews key topic information at the conclusion of each topic.

Scenario

The trainer provides a description of a typical situation that will be used to practice the business activity within SAP.

Scenario Example: An analysis has been conducted and Phasing Plan values have been approved for entry into SAP. The values need to be revised. Update the initial Phasing Plan, including **all elements**, using the same version (version XX) as the original entry.

Demonstration

Trainer shows end-users how to perform the business activity in SAP.

Exercise

End-users practice the activity in the SAP training database.

Agenda

- Introduction and Background Knowledge – 0:15 hr
- Topic 1: Overview of Agency Phasing Plan Process and Version Control– 1:30 hr
 - Activity 1: Determine Phasing Plan Version(s) (Manual) 0:30 hr
 - Activity 2: Notify Project Planner of Plan Version(s) for Phasing Plans (Manual) 0:30 hr
 - Activity 3: Notify System Administrator to Lock/Unlock Phasing Plan Version(s) (Manual) 0:30 hr
- Topic 2: Establishing and Modifying Phasing Plans – 2:00 hr
 - Activity 1: Determine Phasing Plan Version(s) (Manual) 0:05 hr
 - Activity 2: Notify Project Planner of Plan Version(s) for Phasing Plans (Manual) 0:05 hr
 - Activity 3: Record Actuals to Phasing Plans 1:50 hr
- Course Summary – 0:15 hr
- **Total – 4:00 hrs**